

A11

# Plan-Year Calendar

*Pinned in the plan binder and copied into the practice calendar, with an owner and a backup beside every line.*

PRACTICE \_\_\_\_\_

DATE \_\_\_\_\_

## CALENDAR An owner and a backup for every line

| WHEN                                            | WHAT                                                                                                                                           | OWNER | BACKUP | TIME |
|-------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|-------|--------|------|
| First Monday, monthly                           | Member record<br>A10                                                                                                                           |       |        |      |
| A month ahead of each renewal                   | Renewal letters, as the agreement and the terms page say                                                                                       |       |        |      |
| Quarterly                                       | Language check: website, plan sheet, forms and the desk's explanation against the reviewed agreement                                           |       |        |      |
| Monthly for the first half-year, then quarterly | Offer map against the record<br>A9                                                                                                             |       |        |      |
| Yearly, with the fee schedule                   | Fee and discount review: the pool sheet and baselines redone, break-even fees, the mix, the already-regular share against the rules for change |       |        |      |
| Yearly                                          | Rules check: the dated state and terms pages; the attorney if anything moved                                                                   |       |        |      |
| Yearly                                          | What the plan includes: the dentist's review, with the hygiene lead                                                                            |       |        |      |
| Yearly                                          | The plan itself: rebuild the year's number from the record and decide whether it continues                                                     |       |        |      |

## RULES When the numbers say change

Rules for change, written before the next result:

1 Already-regular share above plan for a quarter: \_\_\_\_\_

2 Share near the break-even share with the offer map in place: \_\_\_\_\_

3 Net for a year's new members negative two reviews running: \_\_\_\_\_

NET FOR THIS YEAR'S NEW MEMBERS \_\_\_\_\_

LAST YEAR'S NET \_\_\_\_\_

Counts and totals only: no patient names on this sheet.